

DOCUMENT RESUME

ED 142 104

HE 009 076

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TITLE A Profile of Higher Education in the South in 1985.
INSTITUTION Southern Regional Education Board, Atlanta, Ga.
PUB DATE 77
NOTE 41p.
AVAILABLE FROM Southern Regional Education Board, 130 Sixth Street, N.W., Atlanta, Georgia 30313 (\$1.50)

EDRS PRICE MF-\$0.83 HC-\$2.06 Plus Postage.
DESCRIPTORS Blacks; Centralization; Cooperative Programs; Educational Accountability; *Educational Demand; Educational Supply; *Enrollment Trends; Females; *Financial Problems; *Higher Education; Nontraditional Students; Regional Planning; *Southern States; Statistical Data; *Trend Analysis

ABSTRACT

Based on enrollment projections for the 14 southern states, this profile provides one possible picture of the future of higher education in the South. The report suggests that: (1) the growth of total enrollment will slow and then decline through 1985; (2) nondegree enrollment will increase and bachelor's degree-oriented enrollment will decrease as a proportion of total enrollment; (3) women and blacks will increase in total enrollment; (4) relatively more students will be older than 24, will enroll part-time, and will seek career-related study; (5) public two-year colleges will continue to increase their proportional share of total enrollment; (6) private higher education will experience increased financial difficulties; (7) the demand for new faculty will decrease in absolute terms; (8) institutional programs will become more career-conscious; (9) planning and managing of higher education will become more centralized at the institutional and state level and accountability will be stressed; (10) statewide coordination and institutional management will emphasize cost and outcomes criteria in allocating resources; and (11) the benefits of regional cooperation will become increasingly evident. (Author/LBH)

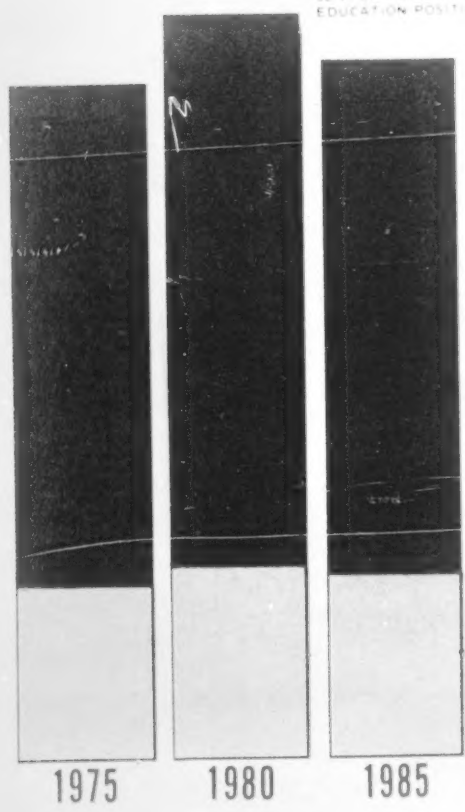
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A PROFILE OF HIGHER EDUCATION IN THE SOUTH IN 1985

U.S. DEPARTMENT OF HEALTH,
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Highlights

- The growth of total enrollment will slow and then decline through 1985.
- Total enrollment will decline in absolute numbers between 1980 and 1985.
- Non-degree enrollment will increase and bachelor's degree-oriented enrollment will decrease as a proportion of total enrollment.
- Women and blacks will increase in total enrollment.
- Relatively more students will be older than 24, will enroll part-time, and will seek career-related study.
- Public two-year colleges will continue to increase their proportional share of total enrollment. Universities and private institutions will have their shares reduced.
- Private higher education will experience increased financial difficulties.
- The demand for new faculty will decrease in absolute terms.
- Institutional programs will become more career-conscious.
- Planning and managing of higher education will become more centralized at the institutional and state level. Accountability will be stressed.
- Statewide coordination and institutional management will emphasize cost and outcomes criteria in allocating resources.
- The benefits of regional cooperation will become increasingly evident as individual states desire higher quality outcomes from higher education with the same or fewer real resources available.

A PROFILE OF HIGHER EDUCATION IN THE SOUTH IN 1985

David S. Spence

Southern Regional Education Board
130 Sixth Street, N.W.
Atlanta, Georgia 30313
1977

\$1.50

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Foreword

"The future of postsecondary education is difficult to forecast but it is already clear that an era of rapid growth and expansion has drawn to a close." The recent position statement of the Southern Regional Education Board, *Priorities for Postsecondary Education in the South*, opens with those sobering words as a preliminary to its listing of priorities for the next decade.

The present report is intended as partial documentation of the premises on which those priorities were based. It is therefore appropriate to indicate briefly a compression of those priorities:

A major priority has been assigned the improvement of the process by which plans and decisions take place in postsecondary education — the structure and process by which limited funds will be allocated and by which public resources will be used.

Education and training for employment has been identified as a special need for high school graduates in the region. Postsecondary education must offer a broad range of opportunities for education beyond high school, and the full diversity of postsecondary institutions and programs must be considered in statewide planning for the effective use of public resources. Directly related to this necessity is a critical need to redefine the purpose and meaning of a baccalaureate education. Undergraduate programs, which have traditionally been the heart of a college education, must be re-examined in terms of changing demands and expectations for education.

Consolidation and restraint in development of graduate and professional education, the adequacy of funding, the use of specialized talents and resources in the solution of societal problems, the need for self-generated reform within the academic community, greater use of nontraditional approaches, and the provision of postsecondary opportunities for minority and ethnic groups are matters that require careful consideration by policy and decision makers in the Southern states.

One of the reasons why it is difficult to forecast the future of postsecondary education is because that future will be largely determined by decisions yet to be made by educators, legislators, voters, students and many others. One of the reasons why the broad educational outlines of the coming decade *can* be foretold with some confidence is because all of the people who will be making those decisions, including the students, are "on board" and can be counted.

Winfred L. Godwin
President

Introduction

This profile provides one possible picture of the future of higher education in the South. It is based on the likely consequences of some of the more important trends and events surfacing today, and is a look at how these current trends will be played out by 1985.

The profile is based on enrollment projections — both of the volume and of the kind of students who may be attending institutions of higher education over the next decade — as the departing point of the profile. The other parts of the picture are drawn on top of the enrollment projections, after taking a long look at who is going to be enrolled in 1985, and what this means for the structure and functioning of the higher education community in 1985.

By focusing on enrollment as the key factor in determining what most other things in higher education will look like, we assume that other very critical elements in the national and regional environment will remain fairly stable — such things as current rates of inflation, no wars, no massive increases in federal spending for higher education or for programs that would affect higher education directly.

Also, use of student enrollment as the central point of analysis captures the spirit of the current re-emphasis on students in higher education. The increasing impact of students is involved in most of the important issues today including student consumerism, equal access, student options, the ascendance of student over institutional aid at the federal level, and the growth of the accountability movement, which focuses on how effective and efficient higher education is in educating its students.

Enrollment estimates for the 14 Southern states were based on National Planning Association (NPA) projections of state populations. To project enrollments, the overall national increase in college attendance, as developed by the National Center for Education Statistics, was applied to the estimated 18- to 24-year-old pool in each state. Thus this profile is based on a college age population which accounts for the bulk of enrollment and an assumed overall attendance increase.

By concentrating only on the numbers and kinds of students who will want to enroll in higher education through 1985, it is easy

to forget that decision-makers can and will influence these trends by making policy that will affect how many and what kinds of students will actually enroll. In many cases, policies are already underway that might eventually alter these trends in enrollment. This profile does not account for these changes. In any case, the value of this profile may perhaps best be found in its offering of a future baseline against which the effectiveness of policies can be gauged as attempts are made to change future higher education for the better.

Total Enrollment

The National Center for Education Statistics projects a total college enrollment of 11.4 million students in the United States in 1985. The Southern Regional Education Board projects that 3.1 million of these students will be attending institutions in the 14 SREB states (Table 1).

Two important trends stand out in these projections. Most crucial for both the region and the nation overall, there will be fewer students between 1980 and 1985 as enrollment may be expected to decrease, by -4.1 percent in the nation and by -2.0 percent in the region over that period. It is likely that between 1975 and 1980 enrollment will still grow in both the region and the United States, by 11.5 in the region and 6.5 percent over the entire nation. But the important points are that there may actually be fewer students in 1985 than in 1980, and that even the 11.5 percent rate of increase from 1975 to 1980 will be much less than from 1970 to 1975 and in the 1960's.

The enrollment projections for 1980 and 1985 indicate Southern regional enrollment is becoming a larger part of total national enrollment, even as both regional and national enrollment starts to decline after 1980 (Figure 1). Total enrollment can be seen to increase during the time from 1975 to 1980, and decrease from 1980 to 1985 in both the region and the nation. There will be a very slight increase in enrollment over the ten-year period from 1975 to 1985, both nationally and regionally: 2.0 percent for the nation and 9.3 percent for the South — much lower than the 88 percent national increase between 1965 and 1975.

This trend means that enrollment in the South is growing more between 1975 and 1980 and will be decreasing less between 1980 and 1985 than in the other regions of the United States. As a result, Southern enrollment will come to make up a larger part of the

Table 1

**Postsecondary Education Enrollment Projections,
Public and Private Combined, 1980, 1985**

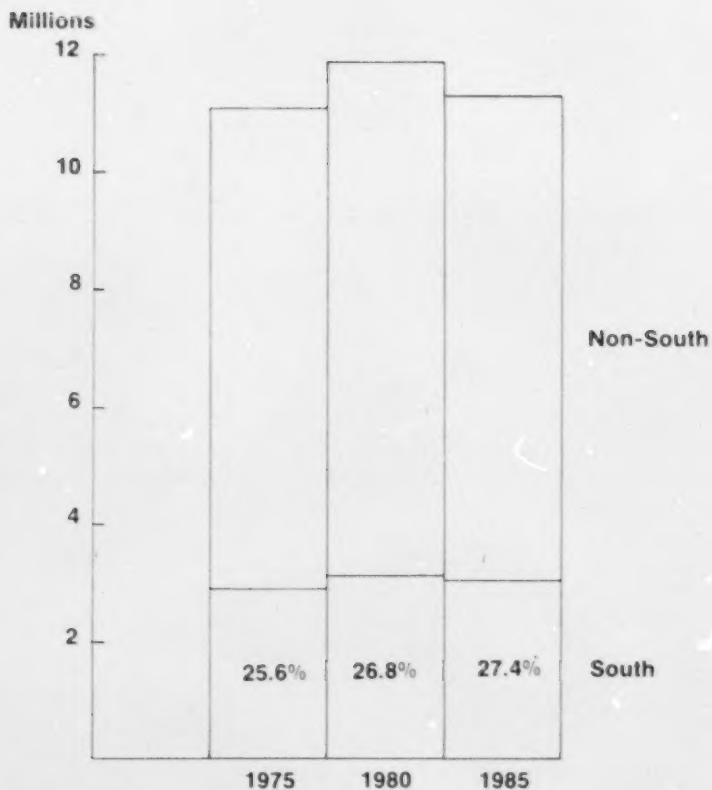
State	Projected Enrollment		Percent Change	
	1980	1985	1975-80	1980-85
United States	11,847,000	11,356,000	+ 6.5	- 4.1
SREB States	3,175,000	3,113,000	+11.5	- 2.0
South as a Percent of U.S.	26.8	27.4	...	...
Alabama	172,000	152,000	+ 6.3	-11.6
Arkansas	72,000	73,000	+ 9.8	+ 1.4
Florida	436,000	492,000	+26.5	+12.8
Georgia	191,000	187,000	+10.0	- 2.1
Kentucky	135,000	125,000	+ 7.8	- 7.4
Louisiana	169,000	158,000	+10.1	- 6.5
Maryland	233,000	237,000	+13.9	+ 1.7
Mississippi	108,000	96,000	+ 8.0	-11.1
North Carolina	281,000	268,000	+ 8.0	- 4.6
South Carolina	138,000	124,000	+ 4.7	-10.1
Tennessee	195,000	185,000	+ 7.5	- 5.1
Texas	702,000	694,000	+12.4	- 1.1
Virginia	270,000	266,000	+11.2	- 1.5
West Virginia	77,000	64,000	- 2.1	-16.9

NOTE: SREB-state enrollment projections are based on the assumption that the ratio that total enrollment was of the population age 18 to 24 in each of the states in 1975 will increase at the same rate as that reflected in the National Center for Education Statistics' *Projections of Education Statistics to 1984-85*. Thus, the 1975 state ratios were increased by 4.5 percent for the 1980 projection and by 6 percent for the 1985 projection. These ratios were then applied to the projected state 18- to 24-year-old populations adapted from the National Planning Association.

SOURCE: James R. Mingle, *Fact Book on Higher Education in the South, 1975 and 1976*, Southern Regional Education Board, 1976.

Figure 1

College Enrollment, United States and South, 1975;
Projections, 1980 and 1985



SOURCE: James R. Mingle, *Fact Book on Higher Education in the South, 1975 and 1976*, Southern Regional Education Board, 1976.

nation's total enrollment in both 1980 and 1985 — from 26 percent in 1975 to 27 percent in 1980 and 1985.

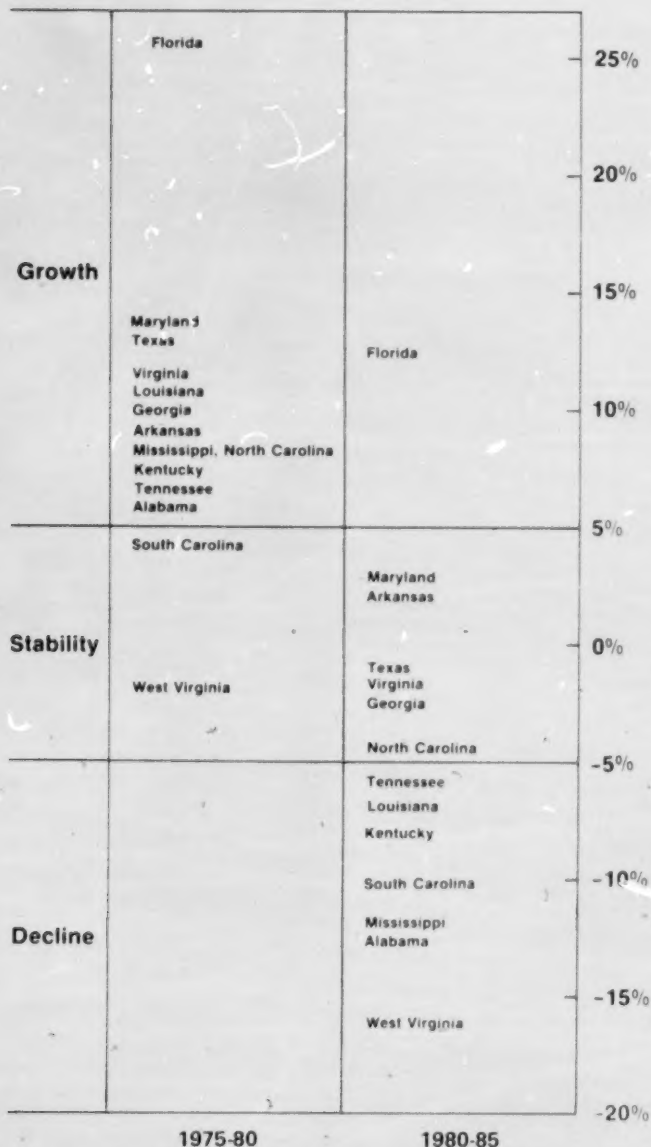
The increases — and then decreases — expected for total regional enrollment between 1975 and 1985 will of course be determined by the different enrollment patterns of the 14 states in the region (Figure 2). Most states show substantial growth from 1975 to 1980, but enter a period of stability or decline from 1980 to 1985. From 1975 to 1980, 12 of the 14 states are projected to be in a growth situation; two in a stable condition. But from 1980 to 1985, all states but one, Florida, are expected to have declining or stable enrollments.

Population Changes

By far the most influential force affecting enrollment will be the smaller growth and, in some states, even decline, in the number of 18- to 24-year-olds in the entire nation, including the 14 SREB states. The number of people in this traditional college-age population group, may be expected to increase by only 3.1 percent in the South between 1975 and 1985 (Figure 3). Even this small increase, however, will prove larger than the .8 of one percent increase projected for the entire nation. The distribution among the states will depend in part on future migration patterns, and therefore the individual state projections are not nearly as certain as the total national and regional projections. While small increases in people of traditional college age are projected from 1975 to 1985, it is more important to realize that, in both the nation and the region, their number will decline from 1980 to 1985 — by -5.5 percent in the nation and by -3.4 percent in the region. The net result of the South's greater growth in 18- to 24-year-olds, compared to the nation, is that the region will have a slightly larger part of the nation's 18- to 24-year-olds in 1985 than in 1980 or 1975. The percentage is projected to move from 30 percent in 1975 to 31 percent in 1985 (Table 2).

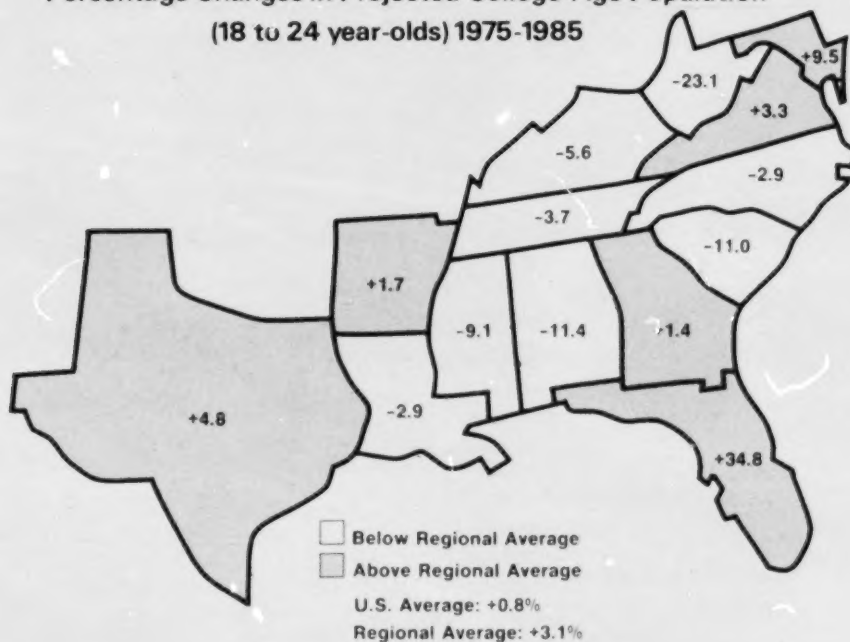
The greater growth of the 18- to 24-year-old population in the South compared to the nation, parallels a 13.5 percent Southern growth in total population compared to 9.7 percent in the nation (Figure 4). The reason for the greater growth in the South is the large net in-migration which is expected to continue through 1985 (Table 3).

Figure 2
Percent Change in Projected Enrollment
1975-1980, 1980-1985



SOURCE: James R. Mingle, *Fact Book on Higher Education in the South, 1975 and 1976*, Southern Regional Education Board, 1976.

Figure 3
Percentage Changes in Projected College-Age Population
(18 to 24 year-olds) 1975-1985



SOURCE: James R. Mingle, *Fact Book on Higher Education in the South, 1975 and 1976*, Southern Regional Education Board, 1976.

Table 2
College-Age Population (18 to 24 year olds)
1975, 1980, 1985, United States and South

	1975	1980	1985
United States	27,400,000	29,200,000	27,600,000
SREB States	8,300,000	8,800,000	8,500,000
South as a Percent of U.S.	30.3	30.1	30.8
Percent Change from 1975 in U.S.	—	6.7	.7
Percent Change from 1975 in SREB States	—	6.7	2.4

SOURCE: James R. Mingle, *Fact Book on Higher Education in the South, 1975 and 1976*, Southern Regional Education Board, 1976.

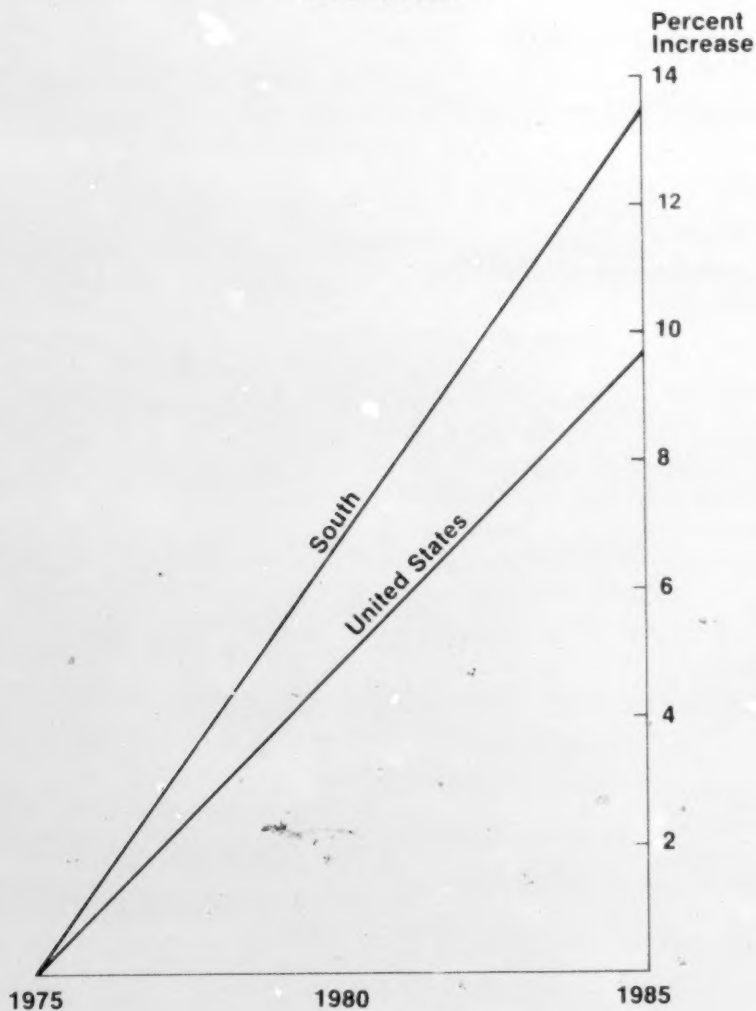
Table 3
Total Population, 1975; Projections to
1980, 1985, United States and South

	1975	1980	1985
United States	213,121,000	222,472,000	233,804,000
SREB States	64,108,000	68,217,000	72,744,000
South as a Percent of U.S.	30.1	30.7	31.1
Percent Change from 1975 in U.S.		4.2	9.7
Percent Change from 1975 in SREB States		6.2	13.5

SOURCE: James R. Mingle, *Fact Book on Higher Education in the South, 1975 and 1976*, Southern Regional Education Board, 1976.

Figure 4

**Total Population, Percent Increase,
United States and South
1975 to 1985**



SOURCES: U.S. Department of Commerce, Bureau of Census, *Current Population Reports*, Series P-25, No. 615 (November, 1975); and National Planning Association, *Regional Projection Series*, 1976.

The Rate of College Attendance

An important trend in recent times is that the percentage of 18- to 24-year-olds who choose to go to college is leveling off after years of steady growth. A major reason may be the less favorable job market for many kinds of college graduates. It has become apparent since the early 1970's that the professional-managerial-technical part of the labor market, which college graduates have traditionally entered in greatest numbers, is not growing as fast as in the past. With ever greater numbers of students graduating, the supply of graduates is greater than the jobs available in this sector of the labor market. At least two reactions are possible. Students, especially students of traditional college age (18 to 24), may come to view college as a lesser investment than in the past and attend in fewer numbers. A second reaction could be from employers, who might adjust to the greater supplies of graduates by upgrading the educational requirements for jobs previously not filled primarily by college graduates. In any event, participation rates of white males have leveled off since the late 1960's.*

As the traditional college-age population decreases, groups of people who have previously not attended college in large proportions are looked to as possible sources to counter the decreasing numbers of traditional students. Older, minority, and working people are choosing to attend higher education in larger proportions because of increased disposable income, greater educational attainment, and heightened occupational, cultural and personal needs for further education.

*While it cannot be forecast exactly how enrollment numbers will be affected by a tight labor market, some possible consequences may be noted.

1. The tighter job market may mean that enrollment projections based on the current participation rates of 18- to 24-year-olds will prove overly optimistic.
2. Career education may become more important in many institutions.
3. The participation rates of non-traditional age groups may continue to increase as a result of job upgrading and increased competition from other job seekers.
4. Enrollment of women and racial minorities may be less influenced by the tight job market.

While it is uncertain to what extent states are prepared to provide places for greater numbers of students, it is expected that most states in the South and elsewhere in the United States will in fact be facing declining enrollments. Therefore a major question becomes one of what deliberate actions the states and the federal government may take to encourage additional participation. It is expected that various measures of student financial aid may be augmented on both the federal and state levels. On the state level, institutional support in the form of appropriations of state tax monies may be expected to follow enrollment patterns. As is already happening, the reliance on student aid as a means for increasing participation rates may lead to increased student consumerism — a gradual movement that sees the impact of students grow as demographic, social, and economic forces join in making it expedient for individual institutions to address student needs.

Kinds of Students

Increasingly, higher education will be attracting students who do not resemble the typical student of the 1960's and before.

Older Students

Perhaps the characteristic having most influence on the functioning of higher education will be that older students may continue to increase as part of total enrollment. As 1985 approaches, and as the number of 18- to 24-year-olds declines, the average age of the population in both the nation and the South will shift upward. The presence of greater proportions of older people in the population is likely to mean increased percentages of older students. Already this trend is clear (Figure 5). By 1975, 33.6 percent of all students in the nation were over 24 years old, up from an estimated 20.5 percent in 1965 (Table 4).

The Carnegie Foundation forecasts that people over 24 years old will enroll in higher education at increasing rates through 1985.¹

Table 4
Percent Distribution, By Age,
of Population Enrolled in College,
United States 1965 and 1975

Ages	1965	1975
16-17	4.4%	2.6%
18-19	37.1	27.1
20-21	22.2	21.3
22-24	15.8	15.4
25-29	10.3	14.9
30-34	5.3	7.8
35 and above	4.9 (Estimated)	10.9
Total	100.0%	100.0%

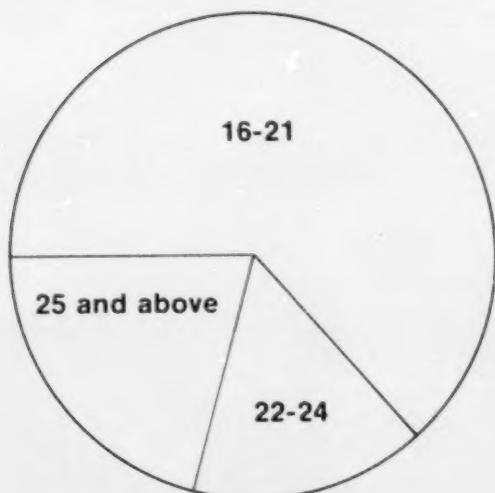
SOURCE: U.S. Bureau of the Census, *Current Population Reports*, Series P-20, No. 162 and 294. Because a count of attendance was not made for the population above age 34 prior to 1974, the 1965 distribution is recalculated.

Some of the increased enrollment from the older age groups may be attributed to the upward shift of the national age distribution. In 1975, 14 percent of the South's population was composed of 18- to 24-year-olds. This percentage will drop to 11.8 by 1985 and continue to decrease to 10.4 by 1990.²

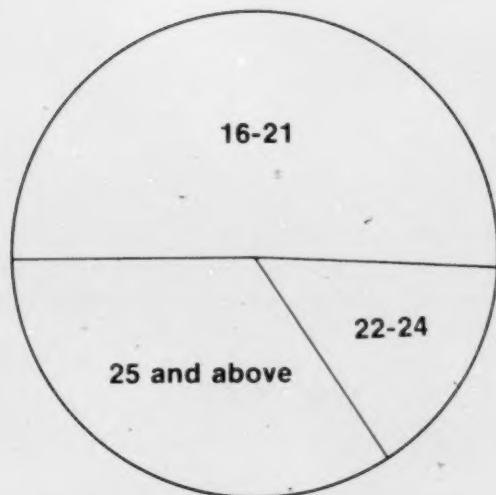
But the increased enrollment of older people may also be influenced by the increased leisure time, income, and previous educational attainment of a more mature population. There is some feeling that the South may trail the nation slightly in the move toward increased proportions of older enrollment because in the South these groups, on the average, currently display less educational attainment, and to some extent, less disposable income, than is true nationally. However, as the 1980's approach, more people over 21 will have graduated from high school and will have attended college and either will want to go to college or continue college. Moreover, personal income is likely to rise in the South. The combination of these two trends points to increased numbers and larger proportions of older students in the South.

Also important, as enrollment changes, will be the sex and racial composition of the projected enrollment.

Figure 5
Distribution of College Enrollment by Age,
United States, 1965 and 1975



1965



1975

SOURCE: See Table 4.

Black Students

In the nation and the region, blacks may be expected to increase their share of total enrollment to levels more in line with the percentage that they are of the total population. Total enrollment will be helped upward by the increased numbers of blacks who will enroll.

In the entire nation, blacks comprised 11.1 percent of the total population in 1970 and 8.8 percent of the total national enrollment in 1974. For the South overall, blacks made up 19.0 percent of the total population and 13.3 percent of the total regional enrollment.³ A comparison of the population and enrollment percentages for blacks in each of the Southern states suggests the potential for future enrollment growth of blacks in the South (Figure 6).

While it is likely that there will be more blacks enrolling in higher education as the participation rates of blacks come closer to the average in both the nation and the region, the greater numbers of black students may not necessarily mean that blacks will become a larger percentage of total enrollment in the South. The chief reason is that the large expected net migration to the South from other regions through 1985 may slightly decrease the proportion of blacks in the total population of the South.⁴

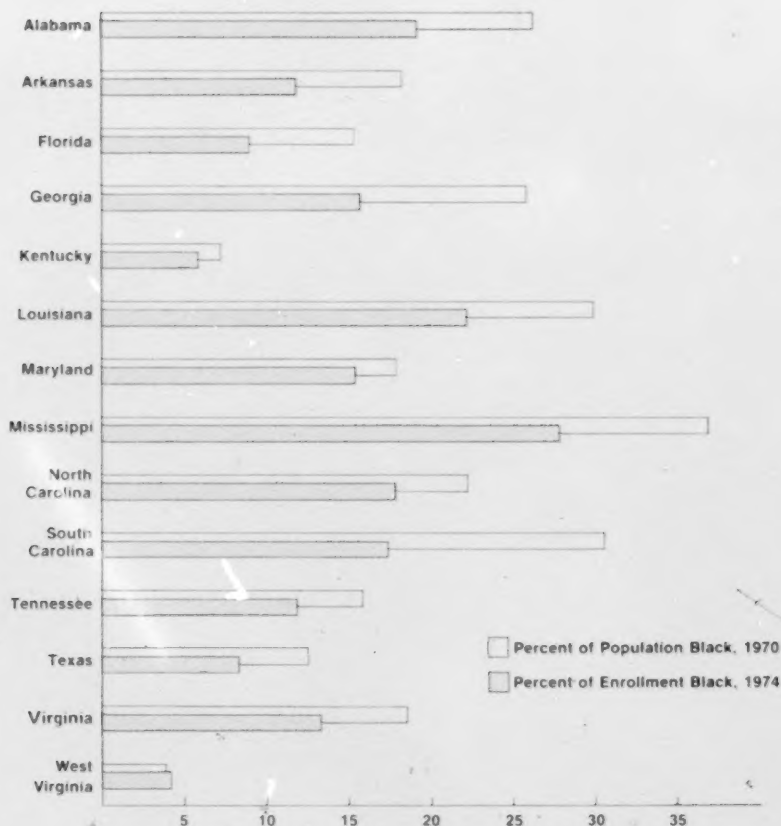
A second factor that could limit the proportionate growth of black enrollment in the South is that older blacks may not attend college at the same increasing rate expected for other racial groups. This possibility springs from the theory that further education correlates highly with earlier educational attainment and income, and older whites still average more educational experience and income than older blacks. Therefore, a reasonable projection will find black enrollment at about 13 percent of total Southern enrollment in 1985.

Women Students

Another group expected to continue to exert an upward push on enrollment through 1985 will be women. In 1976 women represented 47 percent of both national and regional enrollment.⁵ Women have grown as a percentage of Southern enrollment from 1951 through 1976 (Figure 7). The greatest progress may be seen between 1971 and 1976. Cultural forces, such as the women's movement and the need for more women to work and to upgrade their skills, make it likely that women will continue to increase their share of total enrollment, though the rate of this growth will

Figure 6

**Black Population as a Percent of Total Population, 1970;
Black Enrollment as a Percent of Total Enrollment, 1974**



SOURCE: Adapted from James R. Mingle, *Fact Book on Higher Education in the South, 1975 and 1976*, Southern Regional Education Board, 1976.

probably slow somewhat through 1985. We project these increases for women because they still have participation rates significantly below those of men. In 1975, of all the people in the nation who were 18 to 24 years old, 29 percent of the men and 23 percent of the women were enrolled in college.⁶ Between now and 1985 the rates for women will likely increase.

Kinds of Participation

Knowing more about the kinds of students who may be expected to enroll through 1985 can give us a better idea of how these students will wish to participate in higher education. The reasons for and ways in which students of the 1980's may enroll will in turn determine what kinds of institutions will be most influential.

Part-time Enrollment

Students who attend part-time will make up a larger proportion of total enrollment in 1985. Nationally, the percentage of total enrollment accounted for by part-time students may be expected to rise from 38 percent in 1974 to 43 percent in 1985.⁷ While the Southern region showed only 33 percent of enrollment on a part-time basis in 1974,⁸ it too may be expected to follow the national trend toward more part-time study. The outlook for the South is for such enrollment to grow to proportions close to the 43 percent national projected average.

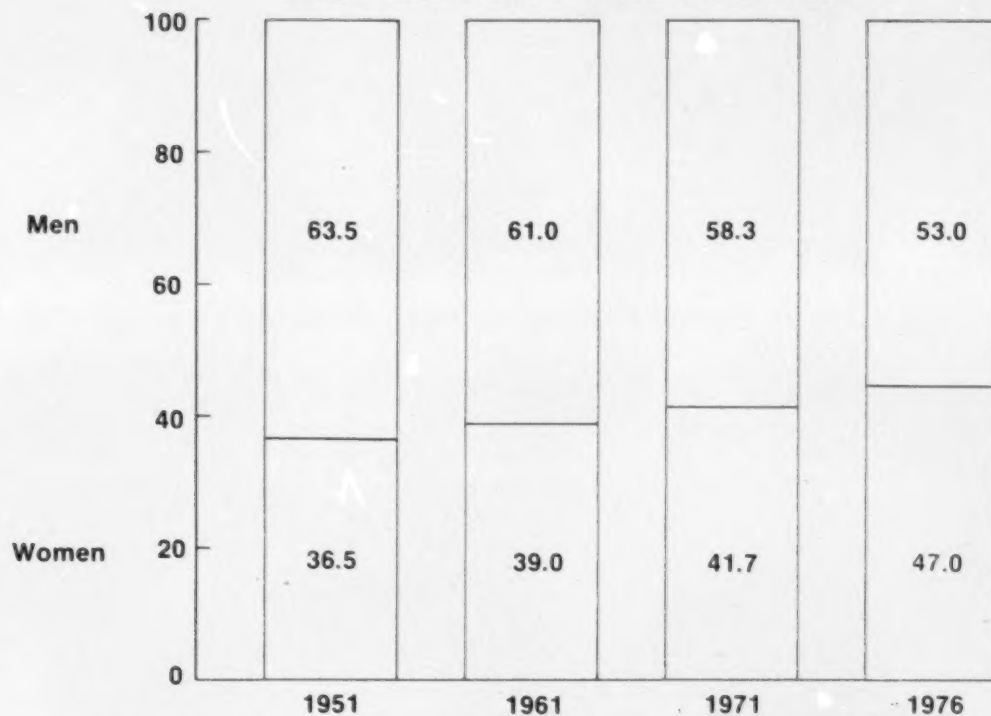
The reasons for more part-time attendance lie in age and labor market influences. Older students, both men and women, are likely to have families and full-time jobs, thus necessitating part-time study. In addition, the larger supplies of college graduates entering the labor market will press older workers to upgrade their educational and career skills more regularly. While some experts predict that sabbaticals and shorter work weeks will gain popularity in more occupations, it is likely that most workers who wish to attend college will still attend part-time. Continuing education requirements in connection with stiffening regulations for relicensure in some professions will also add to the total.

Level of Enrollment

The changing characteristics of students will affect the ways in which these students will enroll. From 1974 to 1984 non-degree related enrollment — or enrollment not related to a bachelor's or higher degree — is expected to increase its share of total enrollment from 10 to 15.5 percent, mainly at the expense of undergraduate and

Figure 7

Women as a Percent of Total Enrollment, South



SOURCES: National Center for Education Statistics, *Fall Enrollment Data, 1976*, preliminary data, January, 1977; and U.S. Office of Education, *Opening Fall Enrollment, 1951, 1961, and 1971*.

first professional degree enrollment, which may drop from 79 percent in 1974 to 73 percent in 1984 (Figure 8).

The reasons for these changes are that greater proportions of older students, women students, students who work full-time and who elect part-time study will be enrolling. These kinds of students will choose to go to college to upgrade their skills for their current occupation or to transfer to another job. Also, more people will enroll for avocational and cultural purposes. For these reasons, the emphasis on the direct route to the four-year bachelor's degree will decrease, as specific courses or small groups of courses which relate to particular occupational skills or avocational interests will become more appropriate for many people. The result may very well be that the trend toward what is called non-degree study will continue as the bachelor's degree, or at least the normal straight path toward it, becomes less important.

Related to the increases in non-bachelor's degree study will be the comparative decrease in enrollment in bachelor's degree related study and the leveling off of medical, law, and dental school enrollments.

As a part of total enrollment, graduate study may increase its share slightly as 1985 approaches, even though there will be oversupplies of many advanced degree-holders. This increase may result because many undergraduate or bachelor degree majors lack clout in the job market unless advanced degrees are held.

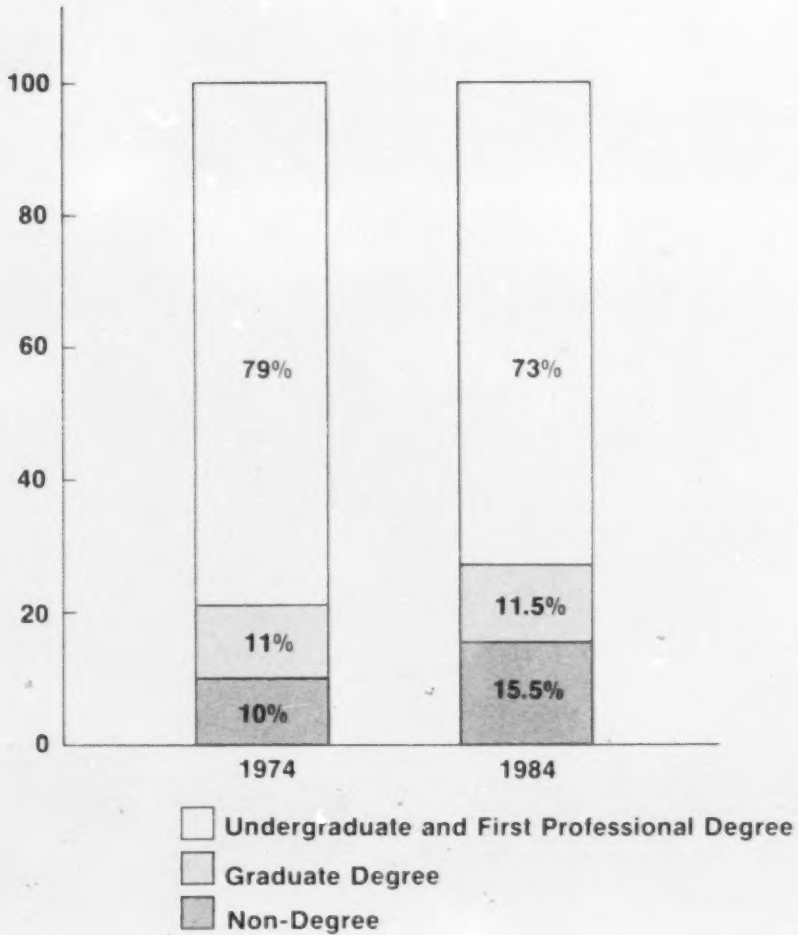
Type of Institution

The kinds of students who enroll, and the ways in which they enroll, go a long way in determining how different kinds of institutions may expect to share the total enrollment in 1985. Public two-year institutions may be expected to claim a growing part of enrollment in 1985 compared to 1975. At least in this profile, all of the other types of public and private institutions will decrease as a proportion of total enrollment over this ten-year period. For the South, the major change is expected to be the continued increasing part that public two-year colleges will play — up from 32.2 percent in 1975 to the 37 percent forecast for 1985 (Figure 9).

A major reason for the increase in the enrollments of the two-year colleges, compared to the four-year institutions, is that greater proportions of older students will enroll. Students who are over 25 years old overwhelmingly tend to enroll in two-year institutions; in fact, over 73 percent of these students spend their first two years of college in a two-year institution.⁹ These colleges tend to be less

Figure 8

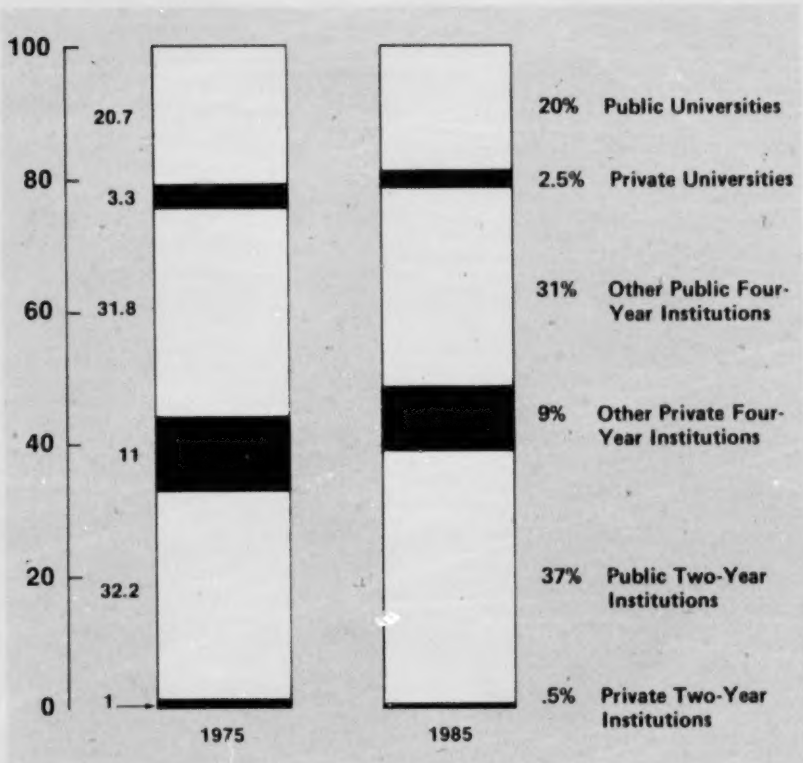
**Level of Enrollment as a Percent of Total
South, 1974, 1984**



SOURCE: Adapted from National Center for Education Statistics, *Digest of Educational Statistics, 1975*; and NCES, *Projections of Education Statistics to 1984-85, 1976*.

Figure 9

Percent of Enrollment by Type and Control
of Institution, South, 1975 and 1985



SOURCES: James R. Mingle, *Fact Book on Higher Education in the South, 1975 and 1976*, Southern Regional Education Board, 1976; projections based on an adaptation to the South of trends for the nation estimated by NCES for the institutional categories in *Projections of Education Statistics to 1984-85*, 1976.

expensive, more accessible, and more related to occupational interests, all of which are traits that fit in with the needs of older students.

A second reason for the increase in the public two-year college sector is that there has been a growing trend for more of undergraduate or bachelor's degree related enrollment to shift from four-year institutions to the two-year colleges for a student's first two years of study. The two-year colleges' share of such bachelor degree related enrollment may go from 28 percent in 1974 to over 33 percent by 1985 in the South (Table 5).

Table 5
Bachelor's and First Professional Degree-Related Enrollment
by Institutional Type, United States, 1974 and 1984

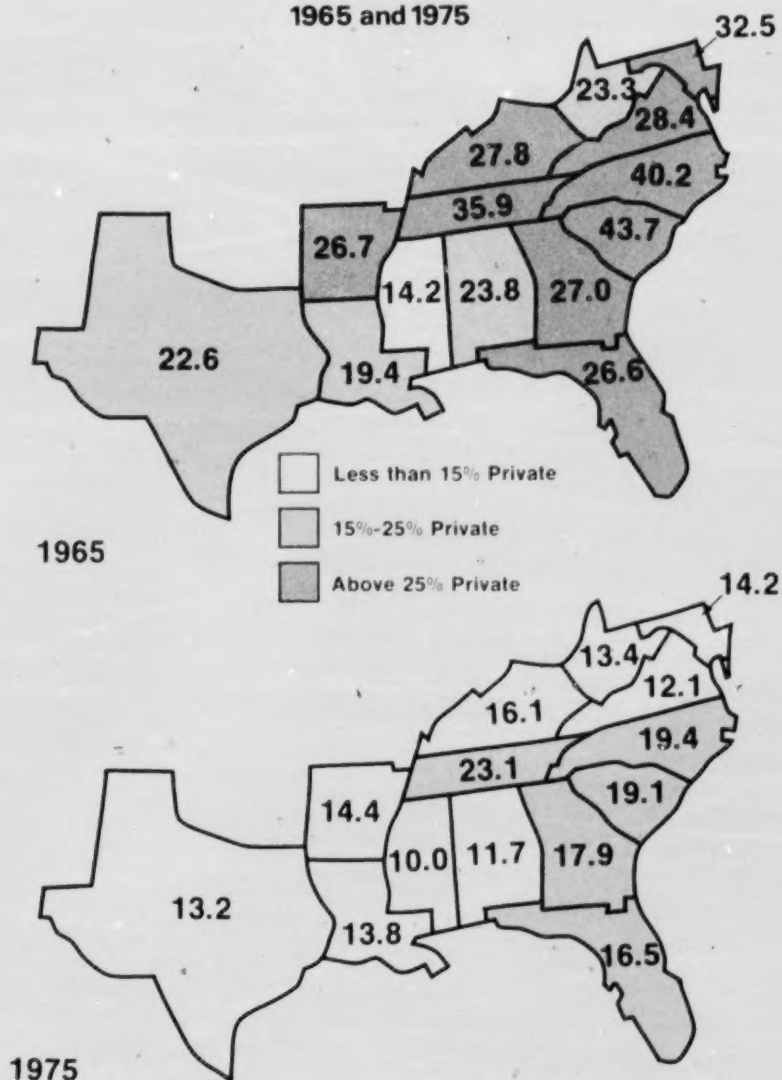
	1974		1984 (Projected)	
	Enrollment	Percent	Enrollment	Percent
Two-Year	2,198,294	28.1	2,872,000	33.9
Four-Year	5,635,000	71.9	5,603,000	66.1
Total	7,833,294	100.0	8,475,000	100.0

SOURCE: National Center for Educational Statistics, *Projections of Education Statistics to 1984-85*, 1976.

Control of Institutions

The kinds of students expected to enroll, where they live, and what they enroll for, may be expected to affect how enrollment is divided between public and private sectors of postsecondary education. Publicly-controlled institutions in the South have moved ahead rapidly in shares of total enrollment and promise to continue in this direction, largely due to the expected growth of public two-year colleges. In 1965, over the entire region, 25 percent of the students attended private institutions. Nine states had over 25 percent of enrollment in private colleges. By 1975, the private share of enrollment was down to 15 percent, with eight states having less than 15 percent of enrollment in private institutions. Not one state had more than 25 percent of enrollment in the private sector (Figure 10).

Figure 10
Enrollment in Privately Controlled Institutions
1965 and 1975



SOURCES: United States Office of Education, *Fall Enrollment in Higher Education, 1965*; National Center for Education Statistics, *Fall Enrollment in Higher Education, 1975*, preliminary report.

In 1975, 79 percent of total enrollment in the nation was in public institutions, somewhat less than the 85 percent in the South.¹⁰ The national percentage is expected to reach 82 percent by 1985.¹¹ The public portion of enrollment will reach 87 to 88 percent in the South by that time if present trends continue. A major reason for the continued growth of the public compared to the private sector may be found in the growth of the public two-year colleges.

With enrollments decreasing in the private sector, not only as a percentage of enrollment but in absolute terms as well, especially after 1982, and with some inflation likely to continue, the financial condition of private institutions may be severe. Increasingly, larger, private, comprehensive four-year colleges may be strained financially as teacher education programs continue to phase down because of the oversupply of elementary and secondary school teachers. Even the larger, private universities may expect increased financial difficulty as graduate enrollment slows through 1982 and declines in absolute numbers after 1982.

But it is the small, private liberal arts institutions that will be especially threatened. Because of smallness, they may lack the flexibility to adjust budgets to enrollment fluctuations and new program demands. Because of their more rural locations and liberal arts emphases, they may not be able to attract the new populations of older, career-oriented students who could balance the expected decrease in traditional college-age students. Small, private liberal arts colleges may find their current five to six percent share¹² of total enrollment shrinking because of financial problems and competition from publicly-controlled two-year and comprehensive four-year colleges.

Certain kinds of institutions serving special constituencies may be expected to increase their enrollment in numbers of students and perhaps maintain their current percentages of total enrollment. For example, predominantly black colleges, which today enroll over 50 percent of black college students in the South,¹³ may be favored by the increased numbers of blacks choosing to go to college. Migration patterns, which could slightly reduce the proportions that blacks are of total population in the South, may mean that the relative increases in total black enrollment will be slowed numerically. Predominantly black colleges may maintain their 1974 eight percent share of total regional enrollment although this will be difficult with the keener competition from other colleges.

Faculty

Another very important part of the basic profile is that, with enrollment expected to decline through 1985, fewer new faculty will be needed if student-faculty and faculty replacement ratios remain the same (Figure 11).¹⁴ The decreased enrollment growth, which will result in fewer total students beginning in 1982, will reduce the demand for new faculty to fill requirements for replacement (Table 6). With enrollments declining in total numbers after 1982, fewer faculty will be needed. Some new faculty will continue to be hired, as the reduction of faculty due to enrollment loss should not

Table 6
New Faculty Needed in South, 1977-1985
Projected, As Net of Enrollment
and Replacement Demands for Faculty

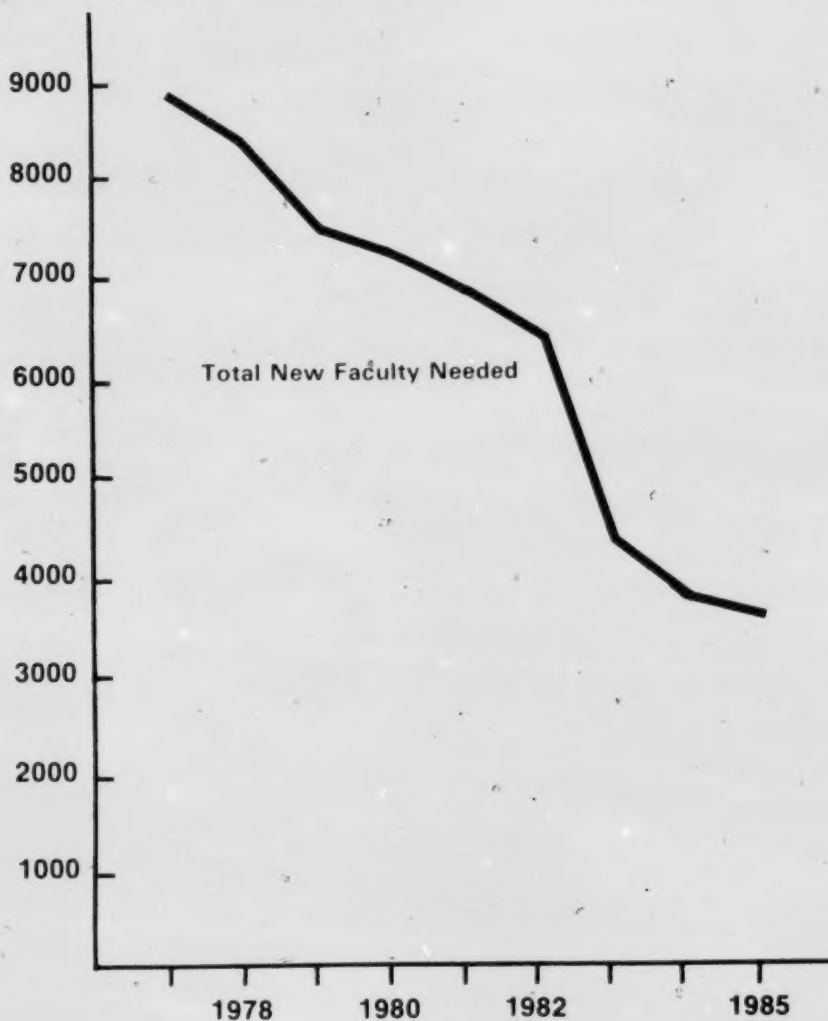
Year	(a) Changes in Number of Faculty to Reflect Enrollment Change ¹	(b) Changes in Number of Faculty to Replace Departing Faculty ²	(c) Total New Faculty Needed in South (sum of columns a and b)
1977	3,000	5,800	8,800
1978	2,400	5,900	8,300
1979	1,600	6,000	7,600
1980	1,100	6,300	7,400
1981	600	6,300	6,900
1982	0	6,300	6,300
1983	-1,900	6,300	4,400
1984	-2,500	6,200	3,700
1985	-2,500	6,100	3,600

1. Based on NCES' projections of full-time-equivalent faculty (Instructor or above) in all U.S. higher education institutions; converted to Southern regional estimates by applying the South's percentage of total U.S. enrollment to the national faculty projections (27 percent 1977-1979; 27.5 percent 1980-1985).

2. Based on applying a replacement rate of 4.5 percent to total full-time-equivalent faculty in previous year; converted to Southern regional figure by applying the region's percentage of national enrollment to total faculty.

Figure 11

New Faculty Needed in South, 1977-1985
Projected, As Net of Enrollment
and Replacement Demands for Faculty



SOURCE: See Table 6.

exceed the number of faculty who leave academe and must be replaced. But even assuming a relatively high replacement rate of 4.5 percent through 1985 (compared to two percent in the 1960's), fewer than 5,000 new faculty would be needed each year from 1982 to 1985 in the South, even with the South's share of total faculty in the nation rising from 25 to 28 percent between 1972 and 1985.¹⁵ Regional needs offer sharp contrasts with annual demands for about 7,000 new faculty from 1972 to 1982, and 9,000 new faculty from 1962 to 1972.

These enrollment driven and faculty replacement factors, along with the prospect that legislatures will continue to press for more economical student-faculty ratios, and shifting of students to community colleges, with their higher student-faculty ratios, combine to decrease the demand for new faculty. New Ph.D.'s especially will be affected by the lowered demand for new faculty since, historically, only 44 to 50 percent of the total new faculty hired have held the doctorate. This would cut the demand for new faculty with Ph.D.'s to fewer than 2,000 by 1985.¹⁶ These prospects will concern those graduate programs that train Ph.D.'s normally headed for faculty positions.

Implications of Enrollment Changes

This profile is based on the numbers and kinds of students who may participate in higher education in 1985. The major part of the profile is a description of the various kinds of students who are likely to enroll and how and in what kinds of institutions such enrollment may occur. These enrollment characteristics are projected by extending current trends into the future. But the picture of who may be going to college, in what ways, and to what kinds of institutions has implications for how higher education will respond, in structure and function, to the needs of the students in 1985.

Financing

The slowing of enrollment overall and its shifting among kinds of institutions combines with inflationary and other competing economic priorities and concerns to have serious implications for the financial picture of higher education through 1985. A financial fact of the 1970's has been a reduced priority of higher education in the federal budget and a slowdown in the growth of higher education appropriations in state budgets. Federal research and fellowship monies have been drastically pared. In the states, other concerns, such as health care, the environment, welfare, crime, transportation, and

elementary and secondary schools are demanding — and getting — higher priorities. At the very least, higher education may not expect to receive an increasing share of state and federal budgets.

Added to the projected decreased growth of federal and state funding is the expected leveling and decline in enrollments through 1985, with an associated decrease in tuition and fee revenue, either from the student directly or from federal or state student aid programs. Raising tuition to offset slower enrollment growth may only lead to less enrollment as potential students prove more responsive to the rising costs and presumed smaller economic returns of college.

An imponderable in the financial outlook for 1985 is how institutions will be funded when enrollment is shrinking. Continuing to fund on an average cost per student basis as enrollment decreases would reduce budgets more than actual costs would be diminished, given fewer students. This is because there is not a one-to-one relationship in retrenchment of resources (and their costs) and decreases in enrollment. Neither are there strict corresponding increases in resources (costs) and student numbers when enrollment is growing. However, until recently, states have been funding higher education as if each additional student cost the same as the average cost of the students already enrolled. This policy favors higher education in a period of growth but could be devastating in a period of declining enrollment.

Higher education will have to adjust to this no-growth or negative growth situation. It will have to make do with less, or at least with less than could be expected under expansive growth policies. Institutions may have the potential to increase productivity as a weapon to combat rising costs and the cost-income gap. Higher education is a labor- or people-intensive industry; thus, increases in how much is produced must derive primarily from direct human effort and not from technological improvements. Whether higher education can produce much more with the same or fewer resources is still an unanswered question. If it cannot, then the financial profile for 1985 will not brighten greatly.

To counter the slowing enrollment, institutions will look to the less traditional populations of students. But the upward effect on total enrollment caused by the increased participation of older and working students will be tempered by the tendency of these students to enroll on a part-time basis to a greater extent than traditional students. It takes larger numbers of part-time students to increase income based on totals of full-time-equivalent students.

A major cause of the widening cost-income gap of the 1970's has been the high rate of inflation compared to the 1960's. Colleges and universities have been hurt more than other consumers in the economy because the kinds and proportions of services and goods bought by institutions have proved more expensive — especially professional salaries. Since higher education depends on human effort to a much greater degree than do most economic sectors, its costs rise more steeply when the cost increases of professional services exceed those of commodities.

By the mid-1970's faculty salaries were being increased at a level below the annual general rate of inflation. Even with these severe cost-minimizing measures, the purchasing power of institutions is decreasing at a rate almost parallel to the general economy. With inflation expected to remain a problem through the early 1980's, institutions, especially small private colleges, will be pressed to increase artificially-depressed faculty and other professional salaries, a decision that would widen the already substantial cost-income gap.

Financial conditions for higher education generally may be slightly better in the South, due to the high priority rated in some state budgets. Also, personal income (and thus the tax base) is expected to increase over the next decade. Private higher education probably will lose some ground in the South, as in the nation. But because the private sector has been a smaller proportion of total higher education in the South than in the nation, the uncertain economic picture for independent colleges will not be as significant to the overall profile of higher education in the Southern region.

Academic Programs

In 1985 the Southern region, as well as the nation generally, will see higher education institutions developing programs to fit the needs and demands of the students composing the enrollment profile. By 1985 institutions may be competing heavily not only for a decreasing pool of traditional college-age students but for the new kinds of potential students who are needed to balance the declining enrollments in the 18- to 24-year-old group. These new students will be older, career-oriented, increasingly interested in creatively using their leisure time, and will tend toward part-time attendance. Even the traditional college-age students will incline more toward career programs instead of the liberal arts — a trend already underway.¹⁷

To compete successfully for these students with varied career and avocational interests, the 1985 programs may be expected to be more relatable to specific student needs. Competency-based evaluation of learning, modular scheduling, personalized instruction and other methods that help students meet individual goals will be used more. The goals and specific outcomes of programs, and how these outcomes may be linked to definite career opportunities and other specific interests will be established. Institutions and their faculties will be working with prospective employers to integrate career and liberal education curricula. Program content may center on the skills and knowledge needed for a specific career or set of careers; other program substance will build on this career basis.

While curricula that relate more directly to specific careers will be more prominent in 1985, it is likely also that higher education will have resolved the career versus liberal education conflict in a way that accommodates career to liberal education and vice versa. The resolution and accommodation are likely to occur as colleges realize that a liberal education is defined less by the content studied than by the skills of thinking, learning, and valuing developed through academic study. As educators come to examine how the skills developed through academic disciplines can be used and be further developed by practical application in the marketplace, more practical content may be integrated in the curriculum with traditional subjects. As part of the accommodation, employers will clarify just what skills and values are needed in certain jobs. They will realize that some of the more specifically related job skills may be taught better on the job but the improvements in communication, comprehension, analytic, and evaluative skills can be made better through a more general education. The big breakthrough may come when employers and higher education agree on what cognitive and affective skills are valuable in employees, and which skills the colleges best nurture through liberal education.

The evaluation and certification functions are more likely to be shared by employers and faculty in 1985. This partnership may extend to program planning and development. Paralleling the colleges' interest in career education will be an expanded use of manpower supply-demand data in planning programs and in keeping both students and programs current in terms of career opportunities and preparation.

Because of the new kinds of students and their demands, instructional patterns will be more varied in 1985, both among and

within institutions and programs. In keeping with the more student-centered, career-oriented programs, faculty will increasingly recognize that students learn in different ways, at different rates, and in different places. Faculty will be more prone to vary their instructional approach for different students — a process implying some trial and error at first, but with eventual emergence of a rudimentary theory of adult learning. Instructional technology will be utilized more, but still selectively — a trend that will allow time for more student and faculty interaction.

Management

The profile of postsecondary education in the Southern region in 1985 has several implications for state, regional, federal, and institutional management of higher education. Management is charged with making decisions to reach valued outcomes. It includes planning activities that will lead to these outcomes, identifying and budgeting the resources needed for these activities, and evaluating their success.

The major features of the profile have been the slowing of enrollment growth and the growing competition for students with increasingly diverse interests, abilities and needs. Leaders in higher education will be challenged to provide quality education to meet the greater diversity, with the same or with fewer real resources.

Statewide Coordination

Coordination of a state's higher education institutions will be imperative in 1985 as most institutional sectors of higher education in the Southern states will face decreasing enrollments and stabilizing or shrinking resources. Moreover, the students who enroll will bring more diverse, but highly specific, demands and needs, and will be more knowledgeable consumers of higher education.

From an individual institution's conventional perspective, the tendency could be to expand its goals and add programs to compete for students and gain additional resources. However, viewed from the statewide perspective, the situation is different. For the state as a whole, there will be decreasing enrollment and the same or fewer resources, to allocate among competing institutions. The states' interests demand the use of scarce resources to meet as many of the different student and state needs as possible, and an overall statewide view is needed to determine the best use of higher education resources.

In the South in 1985, statewide coordination and more centralized resource allocation will be crucial in minimizing wasteful and duplicating competition among institutions. Based on discernible trends, the role and scope of different sectors and specific institutions of higher education in a state will often be defined centrally. Each institution's programs may be monitored to ensure their relationship to assigned mission; new programs may be approved centrally and, in many cases, may hinge on the deletion of an existing program to balance resource use. A great increase may be expected in statewide planning and in the application of state plans by specific institutions to guide admissions, programming, and the allocation of resources among institutions.

By 1985 states will be more concerned that the outcomes of higher education are worth the money spent on them. Legislatures will continue to press for evidence of observable student outcomes, and minimal reading, writing, and arithmetic skills may be required of students in the states' colleges. On a statewide level, there will be attempts to clarify the criteria used to determine resource allocation. By 1985 these funding criteria may include some kind of qualitative or performance basis for allocating resources — criteria that go beyond quantitative formulas. By that time, the current emphasis on outcomes will have helped to identify educational process characteristics and indices that lead to better outcomes. It is likely that a mix of input, process, and outcome criteria will be used to allocate resources.

Regional Cooperation

Because of decreasing enrollments, shrinking resources, and rising costs, individual states will have to move from expansion to consolidation, or even to contraction of higher education services. But the variety of demands on higher education in a given state will remain high. Institutions will wish to compete for students by adding new programs. With declining resources, states will have to limit the desires of institutions to satisfy all the diverse demands of students. Just as importantly, by 1985 it will be more clearly seen from the statewide perspective that it is too costly to generate every desired kind of outcome within a single state's higher education system.

Regional cooperation offers one means to help reduce the dilution of state resources. By sharing programs more fully, needless duplication may be avoided or reduced, and the resources of the different states may be allocated to programs of strength within their systems. More students may be served better with fewer resources through additional interstate cooperation.

Federal Initiative

As enrollment growth slows and its composition becomes more varied, federal support for higher education may flow at a faster rate to institutions through direct student aid. By aiding students directly, the choice as to which institutions are most effective will be lodged with student consumers. The federal government may be expected to aid specific programs within institutions, though not at the level of support in the 1960's. Categorical aid may flow to specifically designed research institutes whose links to higher education will tend to be less strong than in the past.

Based on current trends, the federal government may be expected to ask institutions to be more accountable for funds granted to higher education. Such accountability will apply to institutions receiving direct categorical grants or federal aid through their students. At the federal level, this accountability is likely to center on cost and process criteria, and not as much on student outcomes information. However, it should be noted that the student consumers will render an accounting of institutional effectiveness in the outcomes sense through their actual enrollment choices. Moreover, the states and their legislatures may be expected increasingly to emphasize the cost and outcomes side of accountability.

Institutional Management

Managing higher education institutions during a time of decreasing enrollments and declining resources calls for different techniques than those used during periods of growth. By 1985 most kinds of colleges will have met the challenge of the early 1980's when enrollments will have begun to decline in absolute terms.

Managers in 1985 will be expected to clarify goals as a basis for attracting students and limiting resource use. In order to compete successfully for students, colleges will need to be managed to meet student demands, and to do so with some visibility. This will require colleges to have clear and meaningful goals with which students can identify. It also will mean that colleges will need to maintain their flexibility to respond to new student needs.

Another characteristic of management in 1985 will be the emphasis on defining and increasing productivity and institutional cost-effectiveness. To meet external accountability demands and to attract funding, institutions will have to show how productive they are and how they may become more effective. There will be a

premium on managers who can lead faculty in defining and observing the outcomes they value and in grouping resource costs by program.

Cost-effectiveness can be increased by improving the quality or quantity of certain outcomes while stabilizing or decreasing costs. A major problem lies in defining and identifying quality in outcomes terms. Managers who oversee the evaluation of programs according to cost and outcomes criteria will be able to use the results to increase institutional effectiveness. Emphasis on cost and outcomes criteria may be necessary to satisfy legislative, societal, and student demands for public disclosure of evidences of institutional effectiveness.

A further major aspect of management that will have surfaced by 1985 concerns the need of institutional administrators to establish more recognizable structures, guidelines, and criteria for making resource allocation and program decisions. Clear and specific procedures will be needed because internal and external institutional constituencies will be pressing their own views concerning resource use and programming. The growth of collective bargaining, the efforts of the federal government and the courts to ensure affirmative action and due process and the growing consumerism of the older, career-oriented students of 1985 will influence institutional managers toward establishing open and clear decision-making structures and processes to permit broad participation. Moreover, the criteria used to select alternatives in the decision-making processes will have to be publicly defined and disclosed, especially as they concern the likely costs to be incurred and outcomes to be generated by alternative programs.

Notes

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